

# How to Bareboat Charter with Couples:



**Sandy Williamson, [Sandy@WORDyachts.com](mailto:Sandy@WORDyachts.com)  
Seattle Boat Show, Feb. 2, 2017**

- \* 19 boats: 10 power & 9 sail since 1973 18-28 ft
- \* Places: Puget Sound Olympia to Desolation, Lake Tahoe, TX coast, Ca Coast
- \* 2,000 miles of the northern Great Loop 2007
- \* USCG 50 ton and 6-pack IUPV Captain's license 2012,
- \* ASA 205 license 2012 teaching sail, cruising, navigation.

## \* Sandy & Debbie's owned boats & Places Cruised

- \* 5 Powerboats: 4 houseboats, Bayliner 3788
- \* 6 Monohulls: Mac 26X, Columbia 28, Sloop 28, Hunter 31,32, Catalina 40
- \* 5 Catamarans: Jeaneau 35, 2 Gemini 105, Lagoon 38, Moorings 38
- \* British Channel, Greece, BVI Caribbean, La Paz, Mex. BC Sunshine Coast, 2 Desolation, Barclay Sound, 5 Puget Sound, Columbia R, Miami ICW, Chesapeake Bay, New England, 2 CA Delta, Okanagan, Shushwap.
- \* All but 3 before ASA 201-205 license to teach

# \* Sandy & Debbie's 15 Charters

Sandy & Debbie Williamson, Cruising Map, 1973-Present  
on Owned (17) and Chartered (11) Sail and Power boats.  
See [WORDyachts.com](http://WORDyachts.com) or [WORDBoats.com](http://WORDBoats.com) link to zoom in on  
details&years



# Chartering Overview

- Types of charters
  - Bareboat charters, optionally with a skipper for ½ or full day
  - Flotilla charters
  - Crewed charters (Skipper only or full crew)
  - Learn-to-Sail sailing school charters, ASA 101,103-4
- Charter companies
  - Vary in size
    - Really big (Moorings, Sunsail)
    - Smaller (Horizon, Tortola Marine Management)
  - Worldwide (Moorings) or local Area (Anacortes, San Juan Charters)
  - 1<sup>st</sup> Tier and 2<sup>nd</sup> Tier Companies (Moorings-Footloose)
  - Charter Broker services
    - Boatbound, etc.
    - Fronts for other companies (ABC for Horizon)

# World Chartering Locations

## Caribbean



## MEDITERRANEAN



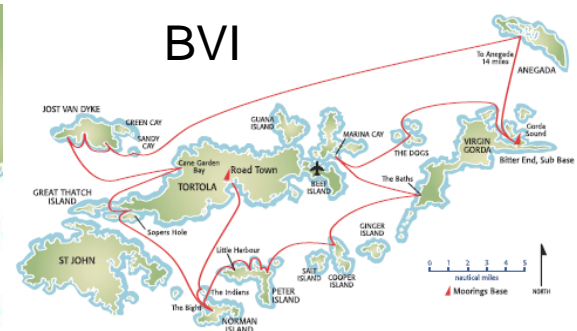
## The Med



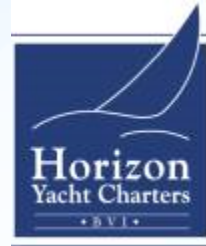
## Greece

1-800-535-7289

## BVI



# Charter Companies



# \*Why?: Local Natural







Foca  
Foca



\* \$\$ Dollars vs. Speed

\* Sailboats [can be operated as a powerboat) are much cheaper for 2 reasons:

1. \$ charter costs per cabin are  $\frac{1}{2}$  of power
2. Fuel costs are less than  $\frac{1}{2}$  due to motor size, hull shape and speed.

\* That's why 9 of 10 yachts have been sail.  
We've sailed less than 5% of the time.

## \* Sail vs. Power Yachts

# Charter Qualifications: What Do You Need?

## **What experience do I need?**

The good news is, you don't need any formal certification. Just experience sailing on a similar sized boat, within about 5-7 feet, will be suitable. Based on the type of sailing conditions you're used to (i.e. body of water, tidal vs. non-tidal, long or short distances, etc.), we'll help you pick the best destination for you.

*Sunsail Yacht Charters*

## **How Do I Qualify?**

It is very easy to determine if you qualify for a yacht and destination. No formal certification is required for most of our destinations. Just complete our sailing resume and submit it on-line. We will inform you what size yacht you qualify to sail with us and which destinations are appropriate for your experience.

*The Moorings*

## **What experience is required to charter a boat?**

Generally, we require that the person chartering the vessel has experience operating a boat of similar size (within three feet), displacement, and rig. As part of the reservation process we will talk with you about your experience. Our checkouts include a chart briefing, full systems checkout, and, if necessary, an underway check out. We want you to feel comfortable handling your yacht.

*Annapolis Bay Charters*

# Sailing/Charter Resume Basics

- No universal standard format
  - Narrative format
  - Sailing log format
- Charter companies use their own forms
  - On-line resume
  - Fill out and mail or fax
- Sunsail and Moorings now ask about ASA sailing qualifications

# Charter Resumes: What to Include

- Personal information
- Sailing experience
  - Have you bareboat chartered before?
    - Charter company, Size/type of boat, Location, Dates, Skipper or Crew?
  - Do you own or have you owned a boat?
    - Size/type of boat(s)
  - Years as a cruising skipper
  - Average number of days you sail each year
  - Primary sailing area(s) and size/type boats usually sailed
  - Experience: anchoring (bow anchor; two anchors; stern anchor; Med. moor), picking up mooring, docking, reefing, navigation, in 25+ knot winds, offshore
- Sailing courses/qualifications/certifications/sailing clubs
- Sailing references
- Any marine claims in past five years?

# Charter Qualifications **forms**

## The Moorings' Sailing Résumé

*Your Passport To*

*The Best Sailing Vacation In The World!*

Are you:  Skipper or  Crew

E-Mail Address \_\_\_\_\_

Signature \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Day Phone \_\_\_\_\_

Have you BAREBOAT chartered before?  Sail -  No  Yes  Power -  No  Yes If yes, please list the largest boats:

Charter Company	Size & Type of Boat	Location	When	Skipper	Crew	Sail	Power
_____	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you taken a sailing course?  No  Yes If so, which one: \_\_\_\_\_

PLEASE INDICATE YOUR EXPERIENCE AND WORKING KNOWLEDGE OF THE FOLLOWING:

### ANCHORING / DOCKING

WORKING KNOWLEDGE # OF TIMES

- Picking up a mooring \_\_\_\_\_
- Single bow anchor \_\_\_\_\_
- Double bow anchor \_\_\_\_\_
- Bow and stern anchor \_\_\_\_\_
- Mediterranean mooring \_\_\_\_\_
- Docking alongside \_\_\_\_\_
- Operating yacht engine \_\_\_\_\_

### NAVIGATION

WORKING KNOWLEDGE

- Reading nautical charts
- Plotting
- Piloting
- Dead reckoning
- Chart plotter/GPS

### TYPE OF SAILING

DO YOU PRIMARILY

- Day-sail
- Cruise
- Race
- Power boat

### ARE YOU INTERESTED IN A POWER OR SAILING CATAMARAN?

*Do you have experience skipping a cruising catamaran with dual inboard auxiliary engines, or any twin screw power vessel?*

No  Yes If yes, describe your experience:

\_\_\_\_\_  
\_\_\_\_\_

How long have you been actively skippering? \_\_\_\_\_ How many days per year? \_\_\_\_\_ Primary sailing areas: \_\_\_\_\_

List boats frequently skippered: size/type \_\_\_\_\_ # days \_\_\_\_\_  
 (Please indicate if owned) size/type \_\_\_\_\_ # days \_\_\_\_\_  
 size/type \_\_\_\_\_ # days \_\_\_\_\_

*Please see other side for more information*

C655/2-02

- \* **HOW MANY YEARS HAVE YOU BEEN SKIPPING SAILING YACHTS?**
- \* Monohulls:
- \* **HOW MANY DAYS IN YOUR LIFETIME / HOW MANY MILES HAVE YOU SKIPPED A SAILING YACHT FOR?**
- \* Monohulls: Catamarans
- \* **PLEASE SPECIFY WHICH SIZES OF YACHT YOU HAVE SKIPPED**
- \* Monohulls: Catamarans:
- \* **PLEASE SPECIFY WHICH TYPES OF SAILING YOU HAVE DONE**
- \* As a skipper: or As Crew:
- \* No Experience
- \* Lakes / Inshore
- \* Coastal
- \* Offshore
- \* Tidal
- \* Non-Tidal

- \* **PLEASE SPECIFY WHICH OF THE FOLLOWING YOU HAVE EXPERIENCE OF**
- \* As a skipper: or As Crew:
- \* Pick up a mooring
- \* Single bow anchor
- \* Docking alongside
- \* Operating a yacht engine
- \* Reading charts
- \* Plotting, piloting
- \* GPS/Chart plotter
- \* Yacht Racing Experience
- \* Distance logged as racing skipper in tidal waters:
- \* Distance logged as racing crew in tidal waters:
- \* Dinghy Experience
- \* How many days have you sailed dinghies for?:
- \* Which sailing qualifications do you hold?
- \* **ASA SAILING QUALIFICATIONS**

# \* SUNSAIL ONLINE RESUME



\* American Sailing Association (ASA) 101 - Basic Keelboat, 103 - Basic Coastal Cruising & 104 - Bareboat Chartering - about 6 days, either 3 weekends or week-long

\* Recreational PowerBoating Asssocation

**Power Cruising:** 32' to 36' boat. Home Study package. This 3 day / 2 night class 1 PM Friday - 4pm Sunday (AYC) \$1250

\* DIY - with your boat and friend's boats with some private teaching on docking and anchoring

\* **How to get trained**

- Week Long Learn'n'Cruise - Get certified to bareboat charter during this week long liveaboard course! Offered spring through fall. Prices start at \$1550
- Weekend Courses - Get certified to bareboat charter in three weekends! Spend the night aboard each evening. Fit your desire to learn to sail into your busy schedule. Prices start at \$385/course.
- Women Only Options - Spend a weekend or a whole week learning to sail in an all-female



San Juan Sailing / Yachting

# \*Flotilla Opportunities

Why participate in a flotilla?

- Gain confidence and familiarize yourself with new cruising grounds
- Camaraderie among fellow cruisers
- Flotilla leader serves as guide, “coach” in anchoring and docking situations as needed, and naturalist!



# Charter Costs (local) Typical 1<sup>st</sup> Tier Company Pricing

About \$500 each  
for a crew of 6  
(\$3,000 boat  
cost only)

High season  
add about  
25-30%+  
for boat cost

Destination:	San Juans/Gulf Islands
Accommodation:	Gemini 105 (34') - 3 Staterooms
Occupance:	6 Adults
Start Date:	Saturday, July 7, 2016
End Date:	Saturday, July 14, 2016
Duration:	7 Days

Add airfare,  
provisioning costs,  
meals ashore,  
shared expenses

Description	Total
Charter Fee	\$2958.63
Damage Waiver	413.00
BVI Cruising Tax	31.50
Prepaid Fuel Charges	210.00
BVI National Parks Permit	35.00
V. Islands Search & Rescue	12.00
Sunsail Care Plan	599.70
<b>Vacation Total</b>	<b>\$4259.83</b>

Total trip cost  
~\$1,700 +/-  
per person

# Cutting Charter Costs A Few Ideas

- Charter from company's "non-premier" fleet
- Charter from a 2<sup>nd</sup> Tier/smaller company
- **Charter during low/off season**
- Negotiate with the charter company
- Repeat customer or group discounts
- **Buy owner's weeks**
  - [www.sailonline.com](http://www.sailonline.com)

# Cutting Charter Costs Owner's Weeks

Boat Description	Beneteau 43 (2006)	<b>NEW!</b>	
Length / Cabins	43 Ft. - 3 cabins - 6 guests		
Boat Location	Road Town, Tortola, BVI + all worldwide bases		
Charter Company	Sunsail		
Dates Offered	Through June 2011		
Price / Range	<b>40% off advertised rates</b>		
Contacts	<a href="#">Email</a> - Tel: 1-919-661-1401 / 919-868-1954		

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Boat Description	<b>2007 R&amp;C 4000 Cat "Powder Days"</b>	
Length / Cabins	40ft. - 4 cabins - 10 guests	
Boat Location	Road Town, Tortola, BVI	
Charter Company	World's leading charter company	
Dates Offered	April 15 - Dec. 15	
Price / Range	<b>50% off Charter Rate (approx. \$3,000)</b>	
Boat Pictures	Exterior - Saloon	
Contacts	<a href="#">E-mail</a> - Ph.: 1-970-819-9978	

# Cutting Charter Costs Other Good Deals

- ABC in Annapolis offers a 10% discount for new PSC Cruising Skippers
- Charter during lower demand periods
- Sleep aboard option before 1<sup>st</sup> night of the charter saves hotel cost and gets another night of vacation

# Making It Happen

## Planning Your Charter

- Where to charter
  - Where do you want to go?
  - Prevailing sailing conditions
    - Weather
    - Degree of difficulty, **Tides & Currents**
  - More or less time sailing
  - Activities (sailing, shopping, nightlife, sightseeing, snorkeling, diving, and of course just “limin”)
- When to charter-mostly 1 week, or off-peak long weekends
  - Seasons (high, low, summer- fall hurricane season in East Coast-Caribbean)
  - **Who to go with: surviving a week together is not easy**



# Making It Happen

## Setting Up Your Charter

- Plan your trip
  - Get your crew
  - Boat type and size
- Contact charter companies
  - Price and terms
  - Responsiveness
- Make your arrangements
  - Charter agreement and resume
  - Deposits
  - Travel (passports, flights, hotels, trip insurance)
  - Charts and cruising guides (draft an itinerary)
  - Organize/prepare your crew

*Don't forget: take less stuff and more money!!!*

# Making It Happen

## Provisioning Options

- Provision through your charter company
  - Convenient
  - Generally more expensive
  - Usually end up with food left over
- Order ahead directly from supplier
  - Convenient
  - Usually less expensive than charter company
- Shop when you get there
  - More work
  - Usually least expensive option
  - See what you are buying
  - Provision for a few days and pick up more as you go



*Don't forget the rum & the toilet paper!!!*

# When You Get There

- Get to marina & check in with charter company
  - Complete your paperwork (cruising permits, return flights)
  - Security deposit
  - Other equipment (boat phone, dinghy locks, snorkel gear)
- Find your boat
- Attend chart briefing
- Boat briefing (*Note: This is part of checking you out*)
  - Boat systems & operation (*check boat carefully; use checksheet*)
  - Safety equipment
  - Dinghy & motor
  - *Condition & inventory*
- Load & stow provisions & gear on boat
- Brief crew & prepare to get underway

- \* How to know if batteries are low
- \* What to do if start battery is weak - How and where to jump from
- \* Y-valves - where and how to set for:
  - pump out at sea 3 miles in USA & out of harbor in Canada
  - using free pump outs in USA

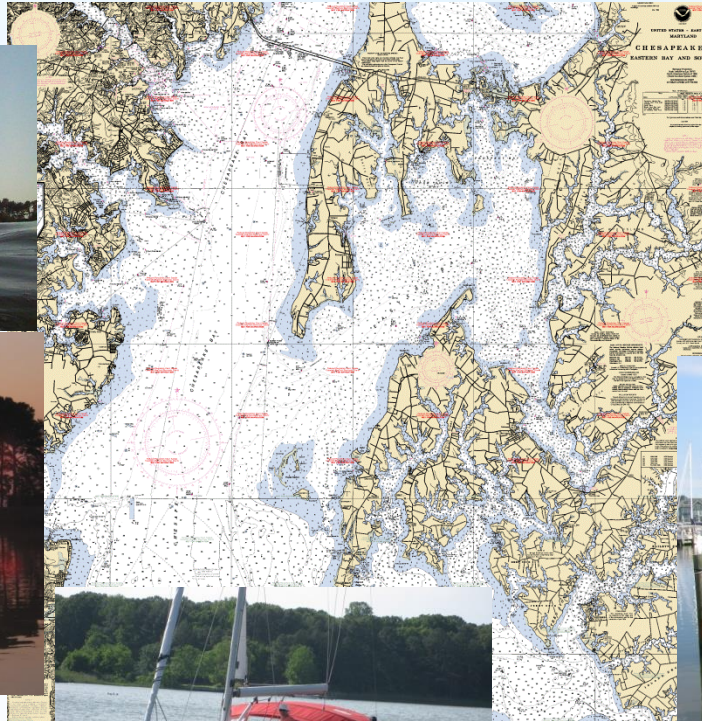
## \* Boat check out Priorities

- \* Plan the night before - get charting on your smartphone or tablet.
- \* Agreed wakeup/start time procedure
- \* Quit early mid pm to get guest slip or anchorage spot - the more popular and crowded, the earlier you must be there
- \* Alone time for each couple
- \* Mid week alone time plan

## \* Typical cruising day

# End of Charter

- Return boat to charter company marina & check in with charter company
  - Refuel boat if required & Pump out Crapper tank
  - Clean up boat as necessary
  - Complete paperwork & boat check-in
  - Turn in boat phone, snorkel gear, dinghy locks, etc. as necessary
  - Check on transportation to hotel, ferry dock, or airport
- **Tell charter company if anything is broken or missing**
  - If they don't know it's broken or lost, they can't fix or replace it
  - Get signed a-ok and how does deposit come back?
- Have a beer or one last Painkiller









# Questions/omments?

\* Contact Info.: Sandy@[WORDyachts.com](mailto:Sandy@WORDyachts.com) WHERE YOU FIND THIS PPT: [WORDyachts.com](http://WORDyachts.com)

\* 888-387-1963 free from Can & US goes to cell phone.

\* Brokerage: 70 ft Westport in the water

\* [EcoCruisers.net](http://EcoCruisers.net)

See Bus. Cards & me at table outside lecture hall after talk. Or North Hall 134 rest of 2016 show.

\* [tinyurl.com/sbs16](http://tinyurl.com/sbs16) goes to:

\* [www.seattleboatshow.com/seminarsurvey](http://www.seattleboatshow.com/seminarsurvey)

# 2013 PSC Raft-up/Cruising Opportunities



- Memorial Day Raft-up (25-27 May 2013)
- BVI Charter Cruise (Early-Mid Jul 2013)
  - Not PSC sponsored



- Labor Day Raft-up? (31 Aug-2 Sep 2013)
- DELMARVA (ASA-106 Advanced Coastal Cruising) (27 Jul-2 Aug 2013)
- Private Boat Owner Sails??
- Others-Croatia??

Tip: Take advantage of these great PSC sailing opportunities to enhance your sailing experience and resume